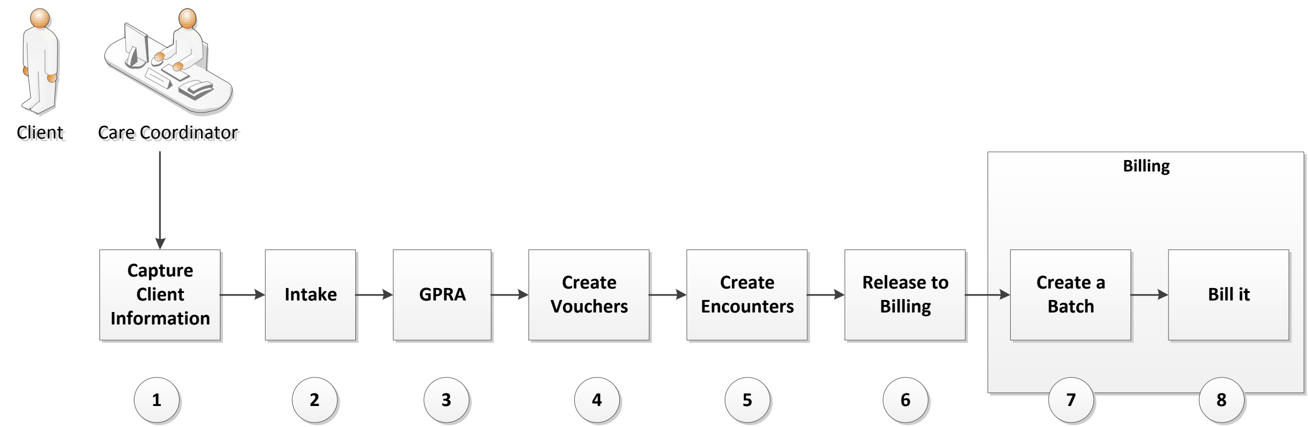
WITS VMS Quick Guide

➢ **<u>Care Coordinator Local (Self Issued) Voucher Workflow and Claim Billing</u>**



1) Adding a New Client
   a) Go to Client List
      i) Search for Client to ensure they don't already exist in the system. If already exists click on Profile and go to step v
      ii) Else Click Add Client. Complete Form.
      iii) Click to add additional client information.
      iv) Click Save.
      v) You will be in the context of the client. See the top context area to ensure you are in the correct client context.
2) Adding an Intake
   a) Go to Client List > Activity List
      i) You will be in the Encounter List for the client.
      ii) Click Start New Episode. Complete form.
      iii) Click Finish.
3) Add GPRA Intake Record
   a) Go to Client List > Activity List > GPRA
   b) Make sure you are in the context of Client. See the Context Area at the top.
      i) If not go to Client List, search for client and click on Profile.
   c) Click Add GPRA Intake.
      i) Complete Form. Click to navigate to next page. Continue until the final page. Make sure you Click Finish to save the GPRA. Otherwise all data entry will be lost.
4) Add RSS Assessment
   a) Activity List>Assessment > RSS Audit – Add Assessment Information
   b) Save as you move through the pages and click Finish once completed.
5) Adding Vouchers

   a) Go to Client List > Client Profile> Voucher
   b) Make sure you are in the context of Client. See the Context Area at the top.
      i) If not go to Client List, search for client and click on Profile.
   c) Click on Add New Voucher Record. Complete Form
   d) Click Save. You will still be in the Voucher Screen.
   e) Click Add Service.
      i) Complete Form. Click Save.
      ii) Repeat step i) as many times as necessary to add services to the voucher.
   f) Click Finish

6) Entering Encounters
   a) Go to Client List > Activity List > Encounters. You will be in the encounter search/list screen
   b) Click Add new Encounter. Complete form.
   c) Enter Notes. Click Sign Note. This will copy the notes and add electronic signature and time stamp.
   d) Click Save to stay on the screen or Click Finish.

7) Release To billing
   a) From the encounter screen click Release to billing. This will submit the encounter to billing as a claim
   b) Click Finish to return to encounter search/list screen.

8) Create Claim Batch (must have Agency Billing and Create Batch Role)
   a) Go to Agency > Billing > Claim Item List
   b) Change Item Status drop down to Released
   c) Click Go. This will list all the claims that have been released for billing. You may review and reject, adjust claims.
   d) Click **Create Batches.**
   e) Select Plan from Available Plans and click > to move to Selected Plan. Click Go.
   f) Now you have created a claim batch. Next you need to bill it

9) Billing a Claim Batch
   a) Go to Agency > Billing > Claim Batch List
   b) Change Status to Released. Click Go.
   c) Click **Profile** for the batch.
   d) Click **Bill it** (At the bottom of the screen). This will submit the claim batch to payor for payment processing. The status of the claim batch will be updated once the payor accepts the batch and approves for payment.
   e) Click Finish to return to Claim Batch List.
   f) Determine Service needs. To search for providers with matching services. Go to Agency > Contract Management > Service Summary.
      i) Enter Search criteria and find appropriate service providers.

10) Adding Consent

a) Go to Client List > Activity List > Consent
b) Make sure you are in the context of Client. See the Context Area at the top.
   i) If not go to Client List, search for client and click on Profile.
c) Click Add New Client Consent Record. Complete form.
d) Click Save .
e) Click Print Report in the top navigation. Print Consent and have client sign paper copy.
f) Change "Has Client Signed Paper Agreement Form" data field to yes.
g) Click Save .

11) Adding Referral
a) From Consent Screen you can click on Create Referral Using This Disclosure Agreement
b) Or, Go to Client List > Activity List > Referral
   i) Click Add New Client Referral Record.
c) Make sure you are in the context of Client. See the Context Area at the top.
   i) If not go to Client List, search for client and click on Profile.
d) Complete form. Click Save .

12) Adding Vouchers
a) From Referral Profile screen
b) Go to Client List > Activity List > Referral > Voucher
c) Click on Add New Authorization Record. Complete Form
d) Click Save . You will still be in the Authorization Screen.
e) Click Add Service.
   i) Complete Form. Click Save .
   ii) Repeat step i) as many times as necessary to add services to the voucher.
f) Click Finish

Repeat steps 4 through 6 for services through other providers.